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# Example of Financial Service Representative Job Description

Our growing company is searching for experienced candidates for the position of financial service representative. To join our growing team, please review the list of responsibilities and qualifications.

## Responsibilities for financial service representative

* Perform Customer Service Rep (Teller) duties as needed
* Assist management with various operational duties and responsibilities
* Handle incoming phone calls regarding various service inquiries on customer accounts
* Calls will need to responded to with a high degree of accuracy and efficiency
* Meet key department performance metrics
* You will work for the fastest growing retirement record-keeper in the country
* You will provide superior customer service to our Retirement 401(k) Participants
* You will receive initial training during your first couple of months which will ensure you gain a solid foundation of our company, products and systems to be well suited to help educate participants on retirement plans
* You will answer incoming calls regarding retirement plans from participants (employees), employers, and third party plan specialists
* You will answer questions ranging from account access via the website, account balances, loan quotes and availability, account changes, withdrawals, rollovers, benefits

## Qualifications for financial service representative

* Strong understanding and ability to communicate the suite of ETFC products and services
* Make outbound calls to current customers - no selling/soliciting
* Perform follow-up administrative functions such as preparing membership packets and scheduling appointments
* Ability to navigate in multiple computer programs simultaneously
* Establish and develop relationships with clients and co-workers
* Work independently and be able to make quick decisions